

COMMUNITY PRESERVATION FUND

2015 ORGANIZATIONAL CHART

COMMUNITY PRESERVATION FUND MANAGER

Mary C. Wilson, Esq.

Professional oversight and management of the Community Preservation Project Plan and the Management and Stewardship Plan. Prioritizes list of parcels to Town Board, conduct Public Hearings and prepares resolutions regarding acquisitions. Negotiates on behalf of the Town to acquire targeted parcels at or below fair market value. Orders appraisals, title premiums and surveys; prepares purchase agreements, easements, covenants and closing documents. Establishes active management and stewardship routines; enforcement of rules and regulations pertaining to Town-owned lands, trail blazing and maintenance. Oversees compliance with State law and local requirements for PILOT payments to eligible special districts with financial certifications by the Town Comptroller, as to calculations made by the Tax Receiver for proposed payments or reductions to tax levies. Oversees, processes and interprets the new First Time Homebuyers Exemption to the 2% real estate transfer tax. Coordinates with other Town, County, State, Federal and private agencies to ensure open space and stewardship goals are achieved. Prepares a 3-year Management and Stewardship Plan and conduct Public Hearings on same. Updates this Plan as often as permitted by statute and as needed to address emerging stewardship and management needs. Oversees an annual independent audit of the CPF revenues as required by statute. Develops working relationships with Federal, State and County agencies involved in land acquisitions. The Town's several CPF historical properties require a special kind of stewardship, which includes the management of licensee organizations. Such management includes ever-increasing oversight and review of these organizations' activities and compliance review of the use of CPF stewardship funds. CPF stewardship of historic properties may also include renovation/construction management in concert with the licensee organization and general compliance with all relevant local, state and federal legislation, as well as grant funding compliance responsibilities. Examines real estate title reports, tax maps, legal descriptions of real property, reviews appraisals, manages inventory of real property and coordinates stewardship tasks

COMMUNITY PRESERVATION FUND ADVISORY BOARD

SENIOR ADMINISTRATIVE ASSISTANT **Adlin Y. Auffant**

In addition to functioning as the Office Manager for the Community Preservation Department, performs many additional duties such as the maintenance of numerous databases, management, coordination and compliance with lending sources, auditing of monthly Peconic Bay Region transfer tax returns, updating the CPF Project Plan and Management and Stewardship Plan, as well as handling of daily inquiries and processing of statutory tax exemptions. Handles all aspects of real estate closings, preparation of 60-100 real estate presentations annually and preparation of resolutions and agendas for the Town Board. Also examines real estate title reports, tax maps, legal descriptions of real property, reviews appraisals, manages inventory of real property and coordinates stewardship tasks.

PRINCIPAL ENVIRONMENTAL ANALYST **Laura Smith**

Performs upwards of 200 monitoring inspections and reports yearly with additional environmental inspections for prospective acquisitions. Provides technical support for PILOT analyses, required reports, acts as liaison to the Friends of the Long Pond Greenbelt and staffs the Long Pond Greenbelt Nature Center. Supervises and performs stewardship tasks; drafts management plans for preserved real property.

PARK RANGER / ORDINANCE ENFORCEMENT OFFICER **Ron Carter**

Performs numerous enforcement and monitoring projects for CPF acquired parcels. Annually, investigates approximately 90 complaints, performs at least 60 inspections and patrols 200 properties. Provides support for baseline inspections and numerous stewardship responsibilities including sign installation and trail maintenance. Instrumental in major property clean-ups, preventing unauthorized ATV use on lands and installing security measures on CPF lands.

ENVIRONMENTAL ANALYST **Vacant (FT)**

Department Summary

Department: Community Preservation

Budget Year: 2015
Division: Community Preservation Department
Tax District: Community Preservation Fund

Cost Center #: 1940
Manager: Mary Wilson

NOTES:

Departmental Mission & Responsibilities:

The Community Preservation Department is responsible for administration of the Town's land acquisition program financed through CPF transfer tax revenues. In addition, enforcement matters and stewardship duties are handled by department staff for assets acquired. Transfer taxes are not real property taxes, but rather a closing cost paid by the buyer when property changes title in the Town to a new purchaser. (Certain exemptions apply)

1. Provide professional oversight and management of the Community Preservation Project Plan and the Management and Stewardship Plan.
2. Maintain numerous databases.
3. Prioritize list of parcels to Town Board, conduct Public Hearings and prepare resolutions regarding acquisitions.
4. Negotiate on behalf of Town to acquire targeted parcels at or below fair market value.
5. Order appraisals, title premiums and surveys; prepare purchase agreements, easements, covenants and closing documents.
6. Baseline documentation and inspection reports for parcels acquired.
7. Establish active management and stewardship routines; enforce rules and regulations pertaining to Town-owned lands, trail blazing and maintenance.
8. Oversee compliance by Town with State law and local requirements for Payment in Lieu of Taxes(PILOT) payments to eligible special districts with financial certifications by the Town Comptroller as to calculations made by the Tax Receiver for proposed payments or reductions to tax levies.
9. Oversee, process and interpret the new First Time Home buyers Exemption to the 2% real estate transfer tax.
10. Oversee, manage and coordinate historic preservation construction projects.

Department Summary

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Budget Year: 2015
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Tax District: Community Preservation Fund

Cost Center #: 1940
Manager: Mary Wilson

NOTES:

Workload:

1. Prepare and implement open space management plans regarding specific target areas and individual parcels.
2. Coordinate with other Town, County, State, Federal and private agencies to ensure open space and stewardship goals are achieved.
3. Prepare a 3-year Stewardship and Management Plan and conduct Public Hearings on same. Update this Plan as often as permitted by statute and as needed to address emerging stewardship and management needs.
4. The CPF Program Manager shall insure an annual independent audit of the CPF revenues is performed as required by statute.
5. The Principal Environmental Analyst performs over 300 initial and annual monitoring inspections and reports, as well as drafts long-term management plans. The CPF Program has acquired interest in over 325 properties, all of which require an initial inspection by the Principal Environmental Analyst, annual monitoring inspections and reports, as well as a long-term management plan. The Principal Environmental Analyst performs additional environmental inspections for prospective acquisitions. This individual also manages complex stewardship projects including drafting and submitting required governmental environmental permit applications. The Principal Environmental Analyst also provides technical support for PILOT analyses, required reports, acts as liaison to the Friends of the Long Pond Greenbelt, staffs the Long Pond Greenbelt Nature Center, conducts invasive plant species removal programs and coordinates various stewardship projects.
6. The Park Ranger / Ordinance Enforcement Officer performs numerous enforcement and monitoring projects for CPF acquired parcels. The Park Ranger / Ordinance Enforcement Officer annually, investigates approximately 90 complaints, performs at least 60 inspections and patrols 300 properties. In addition, the Park Ranger / Ordinance Enforcement Officer provides support for baseline inspections and numerous stewardship responsibilities including sign installation, trail maintenance and property security measures. This person is instrumental in major property cleanups, preventing unauthorized ATV use on lands and installing security measures on CPF lands. This individual is also a member of three subcommittees of the Pine Barrens Law Enforcement Council.
7. The Senior Administrative Assistant, in addition to functioning as the office manager for the CPF Department, performs many additional duties such as the maintenance of numerous databases, management, coordination and compliance with lending sources, auditing of monthly Peconic Bay Region transfer tax returns, updating the CPF Project Plan and Management and Stewardship Plan, as well as handling daily inquiries and processing of statutory tax exemptions. This staff person also handles all aspects of real estate closings, which currently average 15- 20 per calendar year and prepares of 60-100 real estate presentations annually, as well as resolutions and agendas for the Town Board and the CPF Advisory Board. In addition, this individual coordinates, manages and processes all aspects of historic construction projects.
8. The environmental analyst assists and performs stewardship tasks including the completion of baseline documentation, annual property inspections, initial environmental inspections as well as a variety of stewardship tasks working in concert with the Principal Environmental Analyst.

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Goals & Objectives:

The CPF transfer tax has been in place for 14 years, and the success of the program is evidenced in the 3,700 acres of land acquired for protection. These thousands of acres require stewardship and management so that the intent of this program is honored and these community resources are preserved and maintained. In the next year, there will be a strong focus on stewardship and management of the Town's varied CPF lands. These lands include beach access areas, wetlands, woodlands, parks and historic properties and places.

1. Accelerate the processes necessary to further the goals of the Community Preservation Project Plan, specifically through the use of CPF revenues and, if necessary, the \$30 million bond authorization passed to accelerate the preservation of priority open space and farmland.
2. Develop working relationships with Federal, State and County agencies involved in land acquisitions.
3. Coordinate the local and Town Departments to implement the Community Preservation Project Plan.
4. Coordinate and facilitate educational and recreational programs to increase public awareness of the Town's Community Preservation Program.
5. Prepare material with descriptions of preserved lands that are open to the public, including recreational opportunities, trail maps, aerial photographs and other information desired by the public.
6. The Town's several CPF historical properties require a special kind of stewardship, which includes the management of licensee organizations. Such management includes ever increasing oversight and review of these organizations' activities and compliance review of the use of CPF stewardship funds. CPF stewardship of historic properties also includes renovation/construction management and general compliance with all relevant local, state, and federal legislation, as well as grant funding compliance responsibilities and complex bid preparation.
7. Implement recommendations of the 2008 State Comptroller Audit and annual audits and consider augmenting staff resources with additional stewardship staff resources.

Legal Authority:

Pursuant to Chapter 140 (Community Preservation) of the Town Code and NYS Town Law Section 64.

Town of Southampton
2015 Tentative Budget
Community Preservation - 1940

Account Code	Description	2013 Adopted Budget	2013 Actual	2014 Adopted Budget	2014 Amended Budget	2014 Aug YTD Actual	2015 Requested Budget	2015 Tentative Budget	2015 Tentative/ 2014 Amended Difference	2015 Tentative/ 2014 Amended % of Change	2016 Requested Budget	2016 Tentative Budget	2016 Tentative/ 2015 Tentative Difference	2016 Tentative/ 2015 Tentative % of Change
Other Revenue:														
1190	Community Preservation 2%	33,000,000	58,058,512	33,464,020	43,464,020	32,715,637	42,000,000	42,000,000	(1,464,020)	(3.37%)	42,000,000	42,000,000	0	0.00%
1201	Interest And Earnings	150,000	126,817	150,000	150,000	72,239	150,000	150,000	0	0.00%	150,000	150,000	0	0.00%
2701	Miscellaneous Tax Receipts	0	0	0	0	15,454	0	0	0	0.00%	0	0	0	0.00%
2770	Miscellaneous	6,343	5,325	6,343	6,343	6,216	6,343	6,343	0	0.00%	6,343	6,343	0	0.00%
5031	Interfund Transfer - Revenue	0	55,644	0	0	0	0	0	0	0.00%	0	0	0	0.00%
Total Other Revenue		33,156,343	58,246,298	33,620,363	43,620,363	32,809,546	42,156,343	42,156,343	(1,464,020)	(3.36%)	42,156,343	42,156,343	0	0.00%
Total Revenue		33,156,343	58,246,298	33,620,363	43,620,363	32,809,546	42,156,343	42,156,343	(1,464,020)	(3.36%)	42,156,343	42,156,343	0	0.00%
Salaries:														
6100	Salaries	300,098	300,098	343,839	343,839	204,061	369,638	365,667	(21,828)	(6.35%)	377,845	377,845	(12,177)	(3.33%)
6110	Longevity	12,229	12,227	14,202	14,202	0	14,389	14,389	(187)	(1.32%)	14,677	14,677	(288)	(2.00%)
6127	Cash in Lieu of Health Benefits	2,500	0	0	0	0	0	0	0	0.00%	0	0	0	0.00%
6144	Clothing Cleaning	300	300	300	300	300	300	300	0	0.00%	300	300	0	0.00%
Total Salaries		315,127	312,625	358,341	358,341	204,361	384,326	380,356	(22,015)	(6.14%)	392,821	392,821	(12,465)	(3.28%)
Employee Benefits - Current:														
6810	Employee Retirement - Active	42,502	88,274	46,226	52,276	36,579	63,414	62,759	(10,483)	(20.05%)	64,816	64,816	(2,057)	(3.28%)
6830	FICA Tax Expenditure	24,084	23,677	27,413	27,413	15,475	29,401	29,097	(1,684)	(6.14%)	30,051	30,051	(954)	(3.28%)
6835	MTA Tax	1,070	1,053	1,218	1,218	688	1,307	1,293	(75)	(6.14%)	1,336	1,336	(42)	(3.28%)
6840	Worker's Compensation	5,483	5,483	8,522	8,522	4,648	7,894	7,878	644	7.56%	8,079	8,079	(201)	(2.55%)
6860	Medical Insurance - Active Employees	36,612	44,766	66,195	66,195	30,466	70,320	70,320	(4,125)	(6.23%)	70,320	70,320	0	0.00%
6865	Dental & Optical	5,197	4,521	6,512	6,512	3,191	6,512	6,512	0	0.00%	6,512	6,512	0	0.00%

Town of Southampton

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6875	Disability	115	100	144	144	(17)	144	144	0	0.00%	144	144	0	0.00%
	Total Employee Benefits - Current	115,064	167,873	156,230	162,280	91,029	178,991	178,003	(15,723)	(9.69%)	181,257	181,257	(3,254)	(1.83%)
	Total Employee Costs	430,191	480,498	514,571	520,621	295,390	563,318	558,359	(37,739)	(7.25%)	574,078	574,078	(15,719)	(2.82%)
	Equipment:													
6201	Vehicles	50,000	0	30,000	30,000	0	30,000	30,000	0	0.00%	0	0	30,000	100.00%
6208	Land Purchase	18,272,647	28,993,074	16,476,794	46,476,794	30,619,671	21,792,942	21,797,901	24,678,893	53.10%	31,806,397	31,806,397	(10,008,496)	(45.91%)
	Total Equipment	18,322,647	28,993,074	16,506,794	46,506,794	30,619,671	21,822,942	21,827,901	24,678,893	53.07%	31,806,397	31,806,397	(9,978,496)	(45.71%)
	Contractual:													
6400	Contracts - Other	78,800	39,712	78,800	78,800	37,411	73,962	73,962	4,838	6.14%	71,549	71,549	2,413	3.26%
6401	Contracts	150,000	129,650	150,000	150,000	80,530	200,000	200,000	(50,000)	(33.33%)	200,000	200,000	0	0.00%
6403	Gasoline	3,400	2,216	3,400	3,400	1,983	3,400	3,400	0	0.00%	3,400	3,400	0	0.00%
6410	Postage	784	526	784	784	356	784	784	0	0.00%	784	784	0	0.00%
6412	Publications	245	279	300	300	158	300	300	0	0.00%	300	300	0	0.00%
6416	Travel, Dues and Related	490	0	490	301	300	600	600	(299)	(99.34%)	600	600	0	0.00%
6418	Uniforms	196	0	200	200	0	200	200	0	0.00%	200	200	0	0.00%
6424	Taxes - Town Property	147,000	297,332	200,000	200,000	142,067	200,000	200,000	0	0.00%	200,000	200,000	0	0.00%
6425	Office Supplies	588	182	588	587	144	400	400	187	31.86%	400	400	0	0.00%
6426	Supplies - Other	600	252	600	1,800	0	600	600	1,200	66.67%	600	600	0	0.00%
6442	Property Stewardship	1,646,000	93,022	3,396,969	3,395,769	10,662	7,078,833	7,078,833	(3,683,064)	(108.46%)	125,000	125,000	6,953,833	98.23%
6450	Schools & Training	1,176	863	1,200	1,390	1,180	1,200	1,200	190	13.67%	1,200	1,200	0	0.00%
6460	Pilot Payments	2,879,312	2,872,770	3,222,266	3,222,266	3,172,303	3,222,266	3,222,266	0	0.00%	3,222,266	3,222,266	0	0.00%
6466	Telephone - Wireless	0	279	550	550	217	400	400	150	27.27%	400	400	0	0.00%

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6477	Copier Leases	3,200	3,065	1,200	1,200	323	1,200	1,200	0	0.00%	1,200	1,200	0	0.00%
6490	Consultants	39,200	16,915	40,000	40,000	23,715	40,000	40,000	0	0.00%	40,000	40,000	0	0.00%
6497	Misc Expenses	0	3,600	0	0	0	0	0	0	0.00%	0	0	0	0.00%
	Total Contractual	4,950,991	3,460,663	7,097,347	7,097,347	3,471,349	10,824,145	10,824,145	(3,726,798)	(52.51%)	3,867,899	3,867,899	6,956,246	64.27%
	Debt Service:													
6600	Debt Service Principal Expense	7,440,000	3,940,000	7,595,000	7,595,000	900,000	7,163,599	7,163,599	431,401	5.68%	4,247,060	4,247,060	2,916,539	40.71%
6700	Debt Service Interest Expense	2,012,514	2,007,919	1,906,651	1,906,651	956,035	1,782,339	1,782,339	124,312	6.52%	1,660,909	1,660,909	121,430	6.81%
6900	Interfund Transfer Expense	0	879,650	0	0	2,701,417	0	0	0	0.00%	0	0	0	0.00%
	Total Debt Service	9,452,514	6,827,569	9,501,651	9,501,651	4,557,452	8,945,938	8,945,938	555,713	5.85%	5,907,969	5,907,969	3,037,969	33.96%
	Total Expenditures	33,156,343	39,761,804	33,620,363	63,626,413	38,943,863	42,156,343	42,156,343	21,470,070	33.74%	42,156,343	42,156,343	0	0.00%
	Net Surplus (Deficit)	0	18,484,494	0	(20,006,050)	(6,134,317)	0	0			0	0		
	Appropriated Fund Balance:													
9090	Appropriated Fund Balance	0	0	0	20,006,050	0	0	0			0	0		